

North America Autotransfusion System Market - 2025-2033

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Abstracts

Overview

The North American autotransfusion system market reached US\$286.52 million in 2024 and is expected to reach US\$549.78 million by 2033, growing at a CAGR of 7.6% during the forecast period 2025-2033.

Autotransfusion refers to a medical process in which a patient receives their blood for transfusion instead of banked allogenic (donor) blood. Autotransfusion systems collect, process, and reinfuse a patient's blood during surgical procedures. Blood lost at the surgical site is gathered and can be reinfused into the same patient either during or after the operation, as necessary. This technique enhances patient safety by utilizing their blood and effectively manages blood loss during surgery.

Market Dynamics: Drivers & Restraints

Rising Number of Surgeries with Maximum Blood Loss

The rising number of surgeries associated with significant blood loss is expected to drive the autotransfusion system market as healthcare providers increasingly seek effective solutions for managing intraoperative blood loss. Surgeries such as total hip arthroplasty (THA) and total knee arthroplasty (TKA), coronary artery bypass grafting (CABG), and valve replacements, along with other surgeries with maximum blood loss, are demanding patient blood management systems and equipment.

As the volume of these surgeries rises, coupled with the growing emphasis on patient blood management strategies, the adoption of autotransfusion systems is likely to

increase, providing a safer alternative to allogeneic transfusions and enhancing overall patient outcomes.

With the rising number of cardiac surgeries, such as coronary artery bypass grafting (CABG) and valve replacements, the demand for autotransfusion systems is expected to rise due to the high volume of blood loss associated with these procedures. For instance, the National Institute of Health in 2023 stated that almost 400,000 CABG surgeries are performed each year, making it the most commonly performed major surgical procedure.

The rising surgical volumes of orthopedic surgeries, the need for advanced patient blood management devices is rising to reduce blood loss. For instance, the National Institute of Health in 2023 stated that based on 2019 total volume counts, their model forecasts an increase in THA procedures of 176% by 2040 and 659% by 2060. The estimated increase for TKA is projected to be 139% by 2040 and 469% by 2060.

High Costs of Autotransfusion Systems

The high costs associated with autotransfusion systems present a significant restraint in the North America autotransfusion system market, affecting both healthcare providers and patients.

The high costs associated with autotransfusion systems, particularly highlighted by the Haemonetics Corporation Cell Saver Elite PlusBlood Recovery System, which is priced at around USD 5,032.68, pose a significant restraint in the North America autotransfusion system market. This financial barrier impacts healthcare providers' ability to adopt the technologies, especially in smaller facilities or those operating on limited budgets.

The initial investment required for autotransfusion systems can be considerable. The financial strain associated with such investment often leads to reluctance to purchase advanced medical equipment that could enhance patient care and safety during surgical procedures, and thus hampers device adoption.

In addition to the purchase price, ongoing maintenance and operational expenses further complicate the financial landscape. Autotransfusion systems require regular servicing and calibration to ensure they operate effectively and safely.

Segment Analysis

The North America autotransfusion system market is segmented based on product type, technique, application, and end user.

Product Type:

The intraoperative autotransfusion systems from the product type segment are expected to dominate the autotransfusion system market with the highest market share.

Intraoperative autotransfusion systems (IATS) are medical devices designed to recover a patient's blood lost during surgery and reinfuse it back into the patient. This technique, also known as intraoperative blood salvage (IOS), minimizes the need for allogeneic blood transfusions, reducing risks like transfusion reactions and disease transmission. Blood is collected through suction devices and anticoagulants, and then filtered and processed using centrifugation to separate red blood cells from plasma.

The intraoperative autotransfusion systems segment is expected to grow due to various factors like product launches, increasing surgical procedures, a shift towards autologous transfusion, technological advancements, and healthcare infrastructure improvements.

Moreover, intraoperative autotransfusion systems in surgical settings collect and reinfuse a patient's blood lost during surgery, reducing the need for donor blood transfusions and minimizing risks of transfusion-related reactions, infections, and immunosuppression. This method is particularly beneficial in surgeries with high blood loss, such as cardiovascular, orthopedic, and trauma surgeries. It enhances patient safety, supports faster recovery, and contributes to cost-effective surgical care by decreasing reliance on banked blood supplies.

Competitive Landscape

The major North America players in the autotransfusion system market include Fresenius SE & Co. KGaA, LivaNova PLC, Medtronic, Becton, Dickinson and Company, Zimmer Biomet Holdings, Inc., Haemonetics Corporation, Terumo Corporation, Procell Surgical Inc., and Teleflex Incorporated, among others.

Key Developments

In March 2023, Haemonetics Corporation received 510(k) clearance from the U.S. Food and Drug Administration (FDA) on the next-generation software for

the Cell Saver Elite+ Autotransfusion System, with full market release available.

Why Purchase the Report?

Technological Innovations: Reviews ongoing clinical trials, product pipelines, and forecasts upcoming advancements in medical devices and pharmaceuticals.

Product Performance & Market Positioning: Analyzes product performance, market positioning, and growth potential to optimize strategies.

Real-World Evidence: Integrates patient feedback and data into product development for improved outcomes.

Physician Preferences & Health System Impact: Examines healthcare provider behaviors and the impact of health system mergers on adoption strategies.

Market Updates & Industry Changes: Covers recent regulatory changes, new policies, and emerging technologies.

Competitive Strategies: Analyzes competitor strategies, market share, and emerging players.

Pricing & Market Access: Reviews pricing models, reimbursement trends, and market access strategies.

Market Entry & Expansion: Identifies optimal strategies for entering new markets and partnerships.

Supply Chain Optimization: Assesses supply chain risks and distribution strategies for efficient product delivery.

Sustainability & Regulatory Impact: Focuses on eco-friendly practices and evolving regulations in healthcare.

Post-market Surveillance: Uses post-market data to enhance product safety and access.

Pharmacoeconomics & Value-Based Pricing: Analyzes the shift to value-based

pricing and data-driven decision-making in R&D.

The North America autotransfusion system market report delivers a detailed analysis with 42 key tables, more than 43 visually impactful figures, and 159 pages of expert insights, providing a complete view of the market landscape.

Target Audience 2024

Manufacturers: Pharmaceutical, Medical Device, Biotech Companies, Contract Manufacturers, Distributors, Hospitals.

Regulatory & Policy: Compliance Officers, Government, Health Economists, Market Access Specialists.

Application & Innovation: AI/Robotics Providers, R&D Professionals, Clinical Trial Managers, Pharmacovigilance Experts.

Investors: Healthcare Investors, Venture Fund Investors, Pharma Marketing & Sales.

Consulting & Advisory: Healthcare Consultants, Industry Associations, Analysts.

Supply Chain: Distribution and Supply Chain Managers.

Consumers & Advocacy: Patients, Advocacy Groups, Insurance Companies.

Academic & Research: Academic Institutions.

Contents

1. MARKET INTRODUCTION AND SCOPE

- 1.1. Objectives of the Report
- 1.2. Report Coverage & Definitions
- 1.3. Report Scope

2. EXECUTIVE INSIGHTS AND KEY TAKEAWAYS

- 2.1. Market Highlights and Strategic Takeaways
- 2.2. Key Trends and Future Projections
- 2.3. Snippet by Product Type
- 2.4. Snippet by Technique
- 2.5. Snippet by Application
- 2.6. Snippet by End User

3. DYNAMICS

- 3.1. Impacting Factors
 - 3.1.1. Drivers
 - 3.1.1.1. Rising Number of Surgeries with Maximum Blood Loss
 - 3.1.1.2. Rising Innovative Product Launches
 - 3.1.1.3. XX
 - 3.1.2. Restraints
 - 3.1.2.1. High Costs of Autotransfusion Systems
 - 3.1.2.2. Technological Complexity Associated with the Autotransfusion Systems
 - 3.1.2.3. XX
 - 3.1.3. Opportunity
 - 3.1.3.1. Technological Advancements in Product Development
 - 3.1.3.2. Rising Strategic Relations Among Market Players
 - 3.1.3.3. XX
 - 3.1.4. Impact Analysis

4. STRATEGIC INSIGHTS AND INDUSTRY OUTLOOK

- 4.1. Market Leaders and Pioneers
 - 4.1.1. Emerging Pioneers and Prominent Players
 - 4.1.2. Established leaders with the largest-selling Brand

- 4.1.3. Market leaders with established Product
- 4.2. CXO Perspectives
- 4.3. Latest Developments and Breakthroughs
- 4.4. Case Studies/Ongoing Research
- 4.5. Regulatory and Reimbursement Landscape
- 4.6. Porter's Five Force Analysis
- 4.7. Supply Chain Analysis
- 4.8. SWOT Analysis
- 4.9. Unmet Needs and Gaps
- 4.10. Recommended Strategies for Market Entry and Expansion
- 4.11. Scenario Analysis: Best-Case, Base-Case, and Worst-Case Forecasts
- 4.12. Pricing Analysis and Price Dynamics
- 4.13. Key Opinion Leaders

5. NORTH AMERICA AUTOTRANSFUSION SYSTEM MARKET, BY PRODUCT TYPE

- 5.1. Introduction
 - 5.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type
 - 5.1.2. Market Attractiveness Index, By Product Type
- 5.2. Intraoperative Autotransfusion Systems*
 - 5.2.1. Introduction
 - 5.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 5.3. Postoperative Autotransfusion Systems
- 5.4. Dual-Mode Autotransfusion Systems
- 5.5. Autotransfusion Accessories

6. NORTH AMERICA AUTOTRANSFUSION SYSTEM MARKET, BY TECHNIQUE

- 6.1. Introduction
 - 6.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Technique
 - 6.1.2. Market Attractiveness Index, By Technique
- 6.2. Perioperative cell salvage (PCS)*
 - 6.2.1. Introduction
 - 6.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 6.3. Acute normovolaemic Haemodilution (ANH)
- 6.4. Predeposit autologous donation (PAD)

7. NORTH AMERICA AUTOTRANSFUSION SYSTEM MARKET, BY APPLICATION

7.1. Introduction

7.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Application

7.1.2. Market Attractiveness Index, By Application

7.2. Orthopedic*

7.2.1. Introduction

7.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)

7.3. Neurology

7.4. Cardiology

7.5. Others

8. NORTH AMERICA AUTOTRANSFUSION SYSTEM MARKET, BY END USER

8.1. Introduction

8.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By End User

8.1.2. Market Attractiveness Index, By End User

8.2. Hospitals*

8.2.1. Introduction

8.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)

8.3. Specialty Clinics

8.4. Others

9. COMPETITIVE LANDSCAPE AND MARKET POSITIONING

9.1. Competitive Overview and Key Market Players

9.2. Market Share Analysis and Positioning Matrix

9.3. Strategic Partnerships, Mergers & Acquisitions

9.4. Key Developments in Product Portfolios and Innovations

9.5. Company Benchmarking

10. COMPANY PROFILES

10.1. Fresenius SE & Co. KGaA*

10.1.1. Company Overview

10.1.2. Product Portfolio

10.1.2.1. Product Description

10.1.2.2. Product Key Performance Indicators (KPIs)

10.1.2.3. Historic and Forecasted Product Sales

10.1.2.4. Product Sales Volume

10.1.3. Financial Overview

- 10.1.3.1. Company Revenue's
 - 10.1.3.2. Geographical Revenue Shares
 - 10.1.3.3. Revenue Forecasts
 - 10.1.4. Key Developments
 - 10.1.4.1. Mergers & Acquisitions
 - 10.1.4.2. Key Product Development Activities
 - 10.1.4.3. Regulatory Approvals, etc.
 - 10.1.5. SWOT Analysis
 - 10.2. LivaNova PLC
 - 10.3. Medtronic
 - 10.4. Becton, Dickinson and Company
 - 10.5. Zimmer Biomet Holdings, Inc
 - 10.6. Haemonetics Corporation
 - 10.7. Terumo Corporation
 - 10.8. Procell Surgical Inc
 - 10.9. Teleflex Incorporated
- LIST NOT EXHAUSTIVE

11. ASSUMPTIONS AND RESEARCH METHODOLOGY

- 11.1. Data Collection Methods
- 11.2. Data Triangulation
- 11.3. Forecasting Techniques
- 11.4. Data Verification and Validation

12. APPENDIX

- 12.1. About Us and Services
- 12.2. Contact Us

List Of Tables

LIST OF TABLES

Table 1 North America Autotransfusion System Market Value, By Product Type, 2025, 2029 & 2033 (US\$ Million)

Table 2 North America Autotransfusion System Market Value, By Technique, 2025, 2029 & 2033 (US\$ Million)

Table 3 North America Autotransfusion System Market Value, By Application, 2025, 2029 & 2033 (US\$ Million)

Table 4 North America Autotransfusion System Market Value, By End User, 2025, 2029 & 2033 (US\$ Million)

Table 5 North America Autotransfusion System Market Value, By Product Type, 2025, 2029 & 2033 (US\$ Million)

Table 6 North America Autotransfusion System Market Value, By Product Type, 2022-2033 (US\$ Million)

Table 7 North America Autotransfusion System Market Value, By Technique, 2025, 2029 & 2033 (US\$ Million)

Table 8 North America Autotransfusion System Market Value, By Technique, 2022-2033 (US\$ Million)

Table 9 North America Autotransfusion System Market Value, By Application, 2025, 2029 & 2033 (US\$ Million)

Table 10 North America Autotransfusion System Market Value, By Application, 2022-2033 (US\$ Million)

Table 11 North America Autotransfusion System Market Value, By End User, 2025, 2029 & 2033 (US\$ Million)

Table 12 North America Autotransfusion System Market Value, By End User, 2022-2033 (US\$ Million)

Table 13: Fresenius SE & Co. KGaA: Overview

Table 14: Fresenius SE & Co. KGaA: Product Portfolio

Table 15: Fresenius SE & Co. KGaA: Key Developments

Table 16 LivaNova PLC: Overview

Table 17 LivaNova PLC: Product Portfolio

Table 18 LivaNova PLC: Key Developments

Table 19 Medtronic: Overview

Table 20 Medtronic: Product Portfolio

Table 21 Medtronic: Key Developments

Table 22 Becton, Dickinson and Company: Overview

Table 23 Becton, Dickinson and Company: Product Portfolio

Table 24 Becton, Dickinson and Company: Key Developments

Table 25 Zimmer Biomet Holdings, Inc.: Overview

Table 26 Zimmer Biomet Holdings, Inc.: Product Portfolio

Table 27 Zimmer Biomet Holdings, Inc.: Key Developments

Table 28 Haemonetics Corporation: Overview

Table 29 Haemonetics Corporation: Product Portfolio

Table 30 Haemonetics Corporation: Key Developments

Table 31 Terumo Corporation: Overview

Table 32 Terumo Corporation: Product Portfolio

Table 33 Terumo Corporation: Key Developments

Table 34 Procell Surgical Inc: Overview

Table 35 Procell Surgical Inc: Product Portfolio

Table 36 Procell Surgical Inc: Key Developments

Table 37 Teleflex Incorporated: Overview

Table 38 Teleflex Incorporated: Product Portfolio

Table 39 Teleflex Incorporated: Key Developments

List Of Figures

LIST OF FIGURES

Figure 1 North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 2 North America Autotransfusion System Market Share, By Product Type, 2024 & 2033 (%)

Figure 3 North America Autotransfusion System Market Share, By Technique, 2024 & 2033 (%)

Figure 4 North America Autotransfusion System Market Share, By Application, 2024 & 2033 (%)

Figure 5 North America Autotransfusion System Market Share, By End User, 2024 & 2033 (%)

Figure 6 North America Autotransfusion System Market Y-o-Y Growth, By Product Type, 2023-2033 (%)

Figure 7: Intraoperative Autotransfusion Systems Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 8 Postoperative Autotransfusion Systems Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 9 Dual-Mode Autotransfusion Systems Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 10 Autotransfusion Accessories Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 11 North America Autotransfusion System Market Y-o-Y Growth, By Technique, 2023-2033 (%)

Figure 12 Perioperative cell salvage (PCS) Technique in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 13 Acute normovolaemic Haemodilution (ANH) Technique in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 14 Predeposit autologous donation (PAD) Technique in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 15 North America Autotransfusion System Market Y-o-Y Growth, By Application, 2023-2033 (%)

Figure 16 Orthopedic Application in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 17 Neurology Application in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 18 Cardiology Application in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 19 Other Applications in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 20 North America Autotransfusion System Market Y-o-Y Growth, By End User, 2023-2033 (%)

Figure 21 Hospitals End User in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 22 Specialty Clinics End User in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 23: Other End Users in North America Autotransfusion System Market Value, 2022-2033 (US\$ Million)

Figure 24 Fresenius SE & Co. KGaA: Financials

Figure 25 LivaNova PLC: Financials

Figure 26 Medtronic: Financials

Figure 27 Becton, Dickinson and Company: Financials

Figure 28 Zimmer Biomet Holdings, Inc.: Financials

Figure 29 Haemonetics Corporation: Financials

Figure 30 Terumo Corporation: Financials

Figure 31 Procell Surgical Inc: Financials

Figure 32 Teleflex Incorporated: Financials

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